



LEGAL SERVICES CORPORATION

**REQUEST FOR PROPOSAL
FOR DEVELOPMENT OF E-LEARNING TRAINING COURSE**

OCTOBER 14, 2015

INTRODUCTION

Legal Services Corporation (LSC) invites your company to submit a proposal for the development of an e-learning training course on outcomes measurement and management based on the specifications and requirements described in this Request for Proposal (RFP). LSC is looking for a consultant who can offer the best value – the most advantageous balance of price, quality, and performance – to LSC for the creation of this e-learning training course. The anticipated deliverables for this RFP include the development of a 30-45 minute self-guided, interactive e-learning course designed to educate and train LSC's grantees and other legal aid organizations on outcomes measurement and management, including instruction on the basics of collecting, analyzing, and using outcome data to improve client service and program effectiveness.

ABOUT LEGAL SERVICES CORPORATION

LSC was established by an Act of Congress in 1974 and is the nation's largest single funder of civil legal aid programs for people in poverty. LSC currently provides grants to 134 independent, non-profit legal aid programs serving every county in the United States and the territories as well. LSC grantees serve thousands of low-income individuals, children, families, seniors, and veterans in 813 offices in every congressional district. LSC's mission is to promote equal access to justice in the United States and to fund high quality civil legal assistance to low-income persons throughout the country. LSC is responsible for overseeing grantees' compliance with legal requirements and prohibitions, for ensuring grantees' maintenance of the highest quality of service and professions standards, and for ensuring that grants are made so as to provide the most economical and effective delivery of legal assistance. LSC also provides training and technical assistance to grantees.

RFP OVERVIEW

In 2012, LSC received a multi-year grant to implement a project with two purposes: (1) to enhance LSC's ability to assess the quality, efficiency, and effectiveness of the programs that LSC funds; and (2) to provide grantees with better tools to assess their own performance, manage their operations, and increase private financial support. In connection with this project, LSC developed a Civil Legal Outcomes Toolkit, which is a "how-to" guide for legal aid programs to assist them in developing and using an outcomes framework to better track the results impact of their work. The Toolkit, which is hosted on LSC's website, includes examples of outcome measurement systems that have been implemented successfully by other civil legal aid organizations to support their own decision-making and priority setting.

In order to further enhance the Civil Legal Outcomes Toolkit, LSC seeks to develop a self-guided, interactive, e-learning course on outcomes measurement, management, and analysis that will be available as part of the Toolkit. This 30-45 minute course will train legal aid organizations in the basics of collecting, analyzing, and using outcomes data to improve client service and program effectiveness. LSC will create the content for the training in collaboration

with the e-learning consultant designing the interactive course.

DUTIES, TASKS, AND DELIVERABLES

Using the following assumptions, the successful candidate will be expected to perform the following duties and tasks and complete the following milestones and deliverables.

Duties and Tasks

1. Creation of Plan.

Using existing information from LSC and other sources, the consultant, in consultation and collaboration with LSC, will draft a work plan detailing the best means for creating an effective interactive, online training tool for LSC. The Work Plan should discuss the proposed format for the course, including the use of narration and video footage, the format LSC should use to provide the content, the proposed methodology to ensure the course is engaging and interactive, and other any information the consultant deems necessary.

2. Development of Training Course.

Consultant will use adult learning methodologies to create the online training course and interactive features, with input from LSC, to make it most appropriate for online learning.

- a. Subject matter.** LSC will provide detailed subject matter to the consultant, but the consultant will suggest how LSC should focus and coordinate the amount and organization of the subject matter to make the online learning most effective. The specific subject matter for this project is designed to help legal aid programs with defining, collecting and reporting on metrics that describe their effectiveness – specifically, on outcomes for clients in extended service cases. This includes instruction in the following:

- What are outcomes (and outputs)?
- Why measure outcomes? Ways outcomes measures can improve client services and program operations
- Commonly used outcomes measures
- Outcomes data reports for evaluating, documenting and improving client service and program effectiveness and efficiency
- Systems for collecting and analyzing outcomes data
- Steps to develop an outcomes system that is appropriate for your program

- b. **Method of communication.** The e-learning course may include the use of voice-over narration, vignettes, printed materials or other methods to be used in conjunction with each other. The course may include LSC staff to perform some or all of these functions or the consultant may recommend professional writers, actors, or narrators.
- c. **Contents of the interactive, online training.** The course should include the following, though a candidate is not limited to the following elements only; alternative means of meeting LSC's goals will be considered.

- i. **One 30-45 minute interactive, online training course.** The consultant will create the online training containing the subject matter provided by LSC, as described in section 4(b)(i).

The course should incorporate learning and knowledge-measuring tools, such as quizzes, at intervals, to determine whether the trainee is learning the material.

Ideally, LSC envisions incorporating the online course into the web-based, public Civil Legal Outcomes Toolkit and the course may include attachments, notes, and videos. However, a candidate may suggest an alternative means of delivering the course to the audience, so long as there is a means for LSC to make modifications to the course in the future and to make the course available to future trainees.

- ii. **Recommendations related to suggestions for narration.**
To the extent the candidate recommends a format involving narration, the candidate should include suggestions as to equipment and/or recording studios that might be needed to create the narrations. The bid also should provide recommendations as to how much of the narrations should be audio-only and how many should also include video footage. The bid should include the candidate's recommendation as to whether and how much professional actors and voices should be used and the cost of those professional services, and how much LSC staff or volunteers could be used for these purposes.

- iii. **Recommendations related to suggestions for video footage.**
To the extent the candidate recommends a format involving video footage, the bid should include suggestions as to equipment and/or recording studios that might be needed to create any recommended videos, and what those videos might be. The bid should include the candidate's recommendations as to whether and how many professional actors should be used and the cost of those professional services, and how much LSC staff or volunteers could be used for these purposes. The consultant will also work with LSC to develop scripts for any such videos.

iv. **Consultation between LSC and chosen candidate.**

Candidates should suggest the manner and form of effectively training adults online in the subject matter. The training should be interactive and engaging. However, the candidate should be flexible when learning what LSC wants to include in the training.

Candidates' familiarity with adult teaching methods and with methods of online training of adults will be closely scrutinized and evaluated by LSC.

The training should be organized, informative, interactive, engaging and interesting for the trainees. A candidate may wish to suggest the involvement of volunteers and staff in the development process for creation of the online training to determine whether what is being developed is meeting these goals. A candidate is also encouraged to suggest processes for the review by LSC to focus and organize the subject matter to be covered in the presentation.

3. Implementation.

The candidate will make the online tool functional for LSC's use, with input from LSC.

- a. **Timing.** The bid should include a timeline for the creation of the online training course and a date by which the training will be available for use for LSC grantees and other legal aid organizations. The timeline should include enough time for any changes that need to be made to the course after it is evaluated by LSC. In all events, an initial draft of the training course must be available and presented to LSC by January 31, 2016 and in final form by March 1, 2016.
- b. **Evaluation.** The bid should include a means to determine how effective the online training is for the grantees' use and understanding of the subject matter. This should be done at the completion of the training course. LSC will evaluate the effectiveness of the training course to determine the trainees' absorption of material. Based on these evaluations, if absorption is inadequate, LSC may determine that the course needs to be changed to make it more effective. LSC and the consultant will work together to accomplish any necessary changes.

4. Final Report.

Consultant will provide a final summary analysis detailing the work done, the delivery of the training course, and the success of the program in communication of the subject matter.

Project Deliverables

The development of the training course is to be provided to LSC in the following manner:

1. Initial Meeting with LSC

Consultant will meet with LSC personnel in person between December 1-4, 2015 to discuss the parties' roles and responsibilities for the project. At the initial meeting, LSC will provide the consultant with relevant content for the course and the parties will discuss the best means for creating an effective interactive, online training tool.

2. Creation of Work Plan.

Consultant will submit a written outline that clearly details the plan as agreed on with LSC during the planning phase of the program on or before December 20, 2015.

3. Training Course.

Consultant will demonstrate to LSC the completed training course on or before March 1, 2016.

4. Final Report.

Consultant will submit a report to LSC on or before March 21, 2016 detailing the effectiveness of the training course, including the results of the evaluations conducted at the conclusion of the course.

5. Presentations.

Candidate will be available at times and locations to be determined by LSC to present its progress, finding, conclusions and recommendations to LSC.

6. Weekly Status Reports.

Consultant will submit weekly written status reports regarding its progress in complying with the requirements of the contract, including information as agreed with LSC during the planning stage of the course. If applicable, consultant will clearly identify any potential impediments to the successful completion of the project.

Project Management

1. Dedicated Team.

The successful candidate shall have dedicated staff assigned to the project, including a primary point of contact for the duration of the engagement.

2. Location of Performance.

Candidate will be available at times to present its progress, finding, conclusions and recommendations to LSC in Washington, D.C. However, the consultant is not required to develop the course onsite at LSC.

3. Informal information exchanges.

LSC expects that the consultant will answer questions and discuss its progress throughout the engagement term. The consultant will be provided a primary point of contact at LSC.

Estimated Contract Term and Schedule

LSC estimates that this project will take 3-4 months to complete. Work is expected to begin on December 1, 2015 and be completed by March 21, 2016. The following timeline will apply to this project:

| DATE | TASK |
|----------------------|--|
| December 1 – 4, 2015 | Initial Meeting with LSC |
| December 20, 2015 | Initial Work Plan Submitted to LSC |
| January 31, 2016 | Draft of E-Learning Course presented to LSC |
| March 1, 2016 | E-Learning Course Completed and Presented to LSC |
| March 21, 2016 | Final Report Submitted to LSC |

CONSULTANT QUALIFICATIONS

The successful candidate will have demonstrated experience with utilizing adult training methodologies to develop engaging, interactive online training curricula. The candidate should be open to working collaboratively with LSC to determine the most effective manner to deliver the content to its audience. Candidates should be responsive, reliable and have a demonstrated track record of completing projects on time. The candidate should provide at least two (3) references in its bid and two (2) samples of its online work product.

RFP SCHEDULE

LSC will make every effort to adhere to the schedule detailed below:

| DATE | EVENT |
|----------------------------|--|
| October 14, 2015 | RFP issued |
| October 23, 2015 | Deadline for respondents to submit RFP questions |
| October 26, 2015 | LSC responds to RFP questions |
| November 6, 2015 | Deadline for respondents to submit proposals |
| November 7-15, 2015 | Evaluation of proposals |
| November 15, 2015 | Notification to successful candidate of preliminary selection and contract negotiation |
| November 30, 2015 | Contract approval |
| December 1, 2015 | Performance begins |

PROPOSAL SUBMISSION REQUIREMENTS

All proposals must be concise, well-organized, and demonstrate the company's qualifications. Electronic submissions in PDF or Word format are preferred. Proposals must address the following:

Consultant Information

Consultant should provide the following:

- Consultant's full name, address, telephone number, contact person, email, and website.
- Consultant's overview, including brief history, number of employees, and number of years in business.
- Consultant's primary point of contact, including contact's title, phone number, and email address.
- Detailed information regarding the consultant's ability and resources to complete this project.
- Information detailing what, if any, experience consulting has creating e-learning courses for grant-making organizations or organizations utilizing outcomes measurement and management?

Pricing and Pricing Methodology

Candidate should provide an itemized budget that includes a written explanation of all fees and costs. The cost proposal should be divided into two parts: (1) a proposal of a recommended minimum online training effort; and (2) a proposal defining optional additional

training components. LSC reserves the right to choose among the options presented in both the minimum and maximum proposals and will not be required to accept all options listed. The maximum amount of the payment to be made by LSC for the services solicited in this RFP, including all expenses related these services, shall be determined by LSC in the contract award to the successful candidate, but in no event shall be more than \$50,000 over the course of the contract. Any costs incurred (for travel, electronic transmissions, postage, etc.) by the candidate related to any parts of the training program also must come from the amount stated above.

Project Staffing

Candidates should provide resumes and/or biographies for each individuals proposed to staff this engagement and describe the role of each.

Other Information

Consultants may provide other information or material that they believe is relevant to the review process or that provides additional features or value to LSC.

RFP RELATED QUESTIONS

Please submit questions relating to this RFP by email to Helen Gerostathos Guyton, Assistant General Counsel, at guytonh@lsc.gov **no later than 5:30 pm, Eastern Time, on October 26, 2015**. Answers to these questions will be shared with all RFP participants.

PROPOSAL DEADLINE AND MODE OF DELIVERY

Proposals must be in electronic form (PDF or Microsoft Word), and received **on or before 5:30 p.m., Eastern Time, November 6, 2015**. Email proposals to:

Helen Gerostathos Guyton
Assistant General Counsel
Legal Services Corporation
E-mail: guytonh@lsc.gov
Cc to: Lynn Jennings at jenningsl@lsc.gov

RFP respondents are solely responsible for ensuring that proposals are delivered on time. Late proposals may be accepted in LSC's sole discretion. Candidates must bear all costs incurred in preparing proposals. Any final contract awarded will not cover proposal costs.

PROPOSAL EVALUATION CRITERIA

The contract will be awarded to the consultant who will provide the **best value** - the most advantageous balance of price, quality, and performance – to LSC. Proposals will be evaluated based on the following criteria (not necessarily in ranked order):

- ✓ **Quality**
 - Qualifications and experience of consultant and proposed staff
 - Technical expertise
 - Delivery schedule
 - Project plan and approach
- ✓ **Price**
 - The reasonableness of the price for the service being provided.
 - Whether the price is realistic (especially if it is an estimate), reflects a clear understanding of LSC's need, and is consistent with other parts of the proposal.
 - The cost of incidental expenses, including administrative costs, travel and transportation costs.
- ✓ **Performance**
 - Timeliness of deliverables
 - Capacity
 - Understanding of and ability to meet LSC's needs
 - Responsiveness to LSC
 - Professionalism of representatives
- ✓ **Demonstrated reputation for excellence in price, performance, and quality**
- ✓ **Willingness to accept LSC's terms**

LSC's RIGHTS

LSC reserves the right to:

- Accept or reject any or all proposals, or any part thereof;
- Waive any informalities or technicalities contained in any proposal received;
- Conduct discussions with candidates and accept revisions of proposals after the closing date;
- Make an award based upon various selection criteria;
- Request clarification from any candidates on any or all aspects of its proposals;
- Cancel or re-issue this RFP at any time;
- Retain all proposals submitted in response to this RFP;
- Invite some, all, or none of the candidates for interviews, demonstrations, presentations and further discussion;

CONFIDENTIALITY

During the RFP process, you may be given access to LSC's confidential or proprietary information. You agree not to use this information for your or any third-party's benefit, and will not disclose this information to any person who does not have a need to know.

FREEDOM OF INFORMATION ACT

The Freedom of Information Act (FOIA) and associated LSC regulations may require LSC to disclose certain documents to the public, including portions of your proposal. Generally, LSC will not release any documents that would cause your consultant competitive harm. You are encouraged, however, to label any confidential information contained in your proposal to facilitate LSC's ability to withhold it from disclosure.